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ABSTRACT

This instructor's guide and student activity packet (together with a slide/tape presentation not available here) comprise a module for the postsecondary office occupations education competency area of recognizing skills necessary for employment in a business office. Modules for other competency areas are available separately. The purpose is stated for the module is to help students become familiar with the kinds of skills they will need to become employable in an office. The instructor's guide includes an introduction, performance objectives, special notes to instructor, time and facilities, suggestions for discussion, optional student activities, suggested evaluation criteria, keys to student activities, the narrative for the slide/tape presentation, and a list of resources and references. Contents of the student activity packet include an introduction, performance objectives, necessary resource materials, directions for completing the activities provided, a student checksheet for taking notes during the slide/tape presentation, and the activities to be completed in order to master the competencies on which the module is based. (YLB)

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OFFICE OCCUPATIONS

RECOGNIZING SKILLS NECESSARY FOR EMPLOYMENT IN A BUSINESS OFFICE

Audiovisual Package

Instructor's Guide
Student Activity Packet

Prepared by Diane E. Johnson

CE034194

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RECOGNIZING SKILLS NECESSARY FOR EMPLOYMENT IN A BUSINESS OFFICE

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INTRODUCTION

This module, made up of a slide/tape presentation and accompanying printed materials, was developed as a result of a proposal funded by the Texas Education Agency to the Occupational Curriculum Laboratory at East Texas State University. Based on the results of a needs assessment of selected postsecondary office occupations instructors from across the state of Texas, this and several other modules were developed to provide instructional materials in competency areas that require formal classroom training. Selected postsecondary office occupations instructors assisted in the development, field review, and evaluation of the final product.

Included in each slide/tape package are a set of full-color slides, a script, a cassette tape, an instructor's guide, and a student activity packet. Each package includes an instructor's guide with general instructions for use by an individual or in a group setting, the slide/tape presentation, and specific instructions on how to use the materials in a particular package. The specific instructions section contains solutions for the activities completed by the students and suggestions for evaluation of the work produced.

The student activity packet consists of a section on information the student must know in order to complete the activities, any necessary resource materials, and the activities to be completed in order to master the competencies on which the module is based.

All of the materials in these modules have been developed with student needs and interests in mind and are designed with the flexibility for use as supplementary or primary teaching aids in many of the office occupations classes. As a result, the students should find the material practical and job-related.

ACKNOWLEDGMENTS

We extend special thanks to the following Dallas County Community College District personnel for their service as Advisory Committee Members and critical evaluators for this project:

Linda Coffey, District Director of Occupational Education

Patsy Blankenship, North Lake College

Sharon Burton, Brookhaven College

Earlyne Purdy, Eastfield College

In addition to these specific individuals, other selected postsecondary business and office occupations instructors in Texas community colleges have also critically reviewed the materials in their draft form and have provided valuable input for assuring that the final product be as realistic and job-oriented as possible.

Appreciation is also given to the following businesses and institutions which allowed our writers and photographers access to their facilities. It is through their cooperation that the slides which accompany these packages show actual office settings:

Brookhaven College

Office Occupations Laboratory

Job Placement Center

East Texas State University

Business Education Department

Xerox Corporation, Dallas

Sun Production Company, Dallas

Pacific Mutual Insurance Company, Dallas

Finally, special appreciation is extended to Joyce Johnson, East Texas State University, and David MacAnally, Paris Junior College, for their input in the initial development of these materials.

INSTRUCTOR'S GUIDE

RECOGNIZING SKILLS NECESSARY FOR EMPLOYMENT IN A BUSINESS OFFICE

INSTRUCTOR'S GUIDE

GENERAL INSTRUCTIONS

Equipment Needed

Before using this presentation, make sure that arrangements have been made to have the following equipment available:

Projector
Projection Screen
Cassette Recorder

Make sure that all equipment is working properly.

Preparations Before Class

There are some things that you should do before showing the slide/tape presentation.

1. Preview slide/tape presentation and determine how it will be used in your class.
2. Plan short but relevant introductions to tell students what to look for in the slide/tape presentations.
3. Make seating arrangements so that every student can see the screen.
4. Allow enough time to show the presentation in its entirety.
5. If you use handouts, be sure they are distributed after the presentation.

Procedures for Group Setting

1. Choose a point in the lesson where the slide/tape presentation will have the greatest impact.
2. After showing the slide/tape presentation, ask students to give highlights in their own words.
3. If necessary, show the entire presentation or parts of it a second time to emphasize points important to the successful completion of the lesson.
4. After showing the presentation, make arrangements for students to use it on an individual basis.

Procedures for Individual Setting

1. Make sure space and equipment are available.
2. Check equipment to make sure it is working properly.
3. Demonstrate or have someone demonstrate the procedure for using equipment.
4. Tell students to view the slide/tape presentation or parts of it for reinforcement.
5. Have students view the slide/tape presentation.
6. Ask students to summarize the slide/tape presentation.

Instructions for Using Slides and Cassette Tapes

1. Pick up each slide by the frame, being careful not to touch the film.
2. Use the side of the tape which is compatible with the equipment you are using. One side of the cassette tape contains an audible advance and the other side contains an inaudible advance.
3. Arrange the slides in the slide tray in sequential order to insure that each projection is viewed from left to right.
4. Insert the cassette tape in the recorder/player.
5. Rewind the cassette tape to make sure that it will start at the beginning.
6. Turn on the slide projector. The first slide should be projected on the screen.
7. Start the cassette player.
8. Depress the advance button at the sound of the "beep" if you are using the audible advance.

(NOTE: Review the above procedures with those students who will be using the package individually.)

Student Checksheets

Student checksheets provide a convenient means for students to take notes while viewing the slide/tape presentations. The points identified on the student checksheet are those the student will have to be familiar with in order to complete the activities provided.

Resource Sheets

Resource sheets provide information essential for reinforcing the competency requirements of the slide/tape presentation.

Students should read the resource sheets as instructed in each student activity packet.

Activity Sheets

Activity sheets are working papers for students. Students are instructed to use them when completing certain activities.

RECOGNIZING SKILLS NECESSARY FOR EMPLOYMENT IN A BUSINESS OFFICE

INSTRUCTOR'S GUIDE

SPECIFIC INSTRUCTIONS

Introduction to Slide/Tape Presentation

Recognizing Skills Necessary for Employment in a Business Office is an audiovisual aid developed to help students become familiar with the kinds of skills they will need to become employable in an office.

This slide/tape package consists of 36 full-color slides, a cassette tape, an instructor's guide, and a student activity packet that could be used as primary of supplementary instructional tools in an office/ secretarial procedures class.

Script

A description of each slide and its narration can be found at the end of the Specific Instructions.

Time and Facilities

Approximately 20 minutes of one class session should be set aside for introduction and presentation of the slide/tape, which can be shown in any room that can be sufficiently darkened or that has individual carrels equipped with slide carousels and cassette tape recorders. In addition, students should be able to complete the three activities in approximately 3-4 hours.

Suggested Class Discussion (for use in a group setting)

After the slide/tape has been presented, each of the skills mentioned should be discussed. Students should be urged to tell of situations in which they have been required to use the various skills.

In order to encourage discussion and cooperation among students, the instructor may wish to assign students to work on any or all of the provided activities in small groups of three or four students.

After the students have completed the three activities provided in the Student Activity Packet and their work has been evaluated, each of the situations should be discussed. The instructor should explain why each of the skills listed on the Key was necessary to the

particular situation. Students should be encouraged to add any other reasons they feel a particular skill was needed in the situation described or to add and justify any skills they feel should have been but were not included in the Key.

Suggested Student Activities

Three activities are provided in the Student Activity Packet. These activities are designed to reinforce the information presented on the slide/tape and to give the students an opportunity to analyze three situations in which various office skills are needed. The students will have to make decisions in determining which skills should be included on their answer sheets.

If students are assigned to work in small groups, they will necessarily use many of the basic office skills in completing the assigned activities. Because the students will be actively involved in an office-type situation (e.g., committee meeting), the instructor may choose to have the students complete a fourth activity--that of listing and explaining those basic office skills they used as a member of the group.

To further emphasize the importance of mastering basic office skills, the students might be required to visit a business office. During a one- or two-hour visit, the student could be required to observe and record the basic office skills used by the secretary. The findings of all students could then be compiled and a list of most commonly used office skills could be prepared.

Suggested Evaluation Criteria

The following is a checklist that can be used when evaluating the student's successful completion of this packet. This checklist is not intended as a method of grading but merely as a means of determining whether or not the student has mastered the competencies presented in this package.

1. Completion time for activities

    a. Completion time less than suggested time limits _____

    b. Completion time within suggested time limits _____

    c. Completion time exceeded suggested time limits _____

2. Determining necessary basic office skills

    a. All necessary skills identified and justified _____

    b. Less than 100 percent of necessary skills identified and justified _____

c. Additional skills identified with acceptable justification _____

d. All necessary skills identified but not justified _____

e. Less than 100 percent of necessary skills identified but not justified _____

f. Additional skills identified but not justified _____

3. Participation in class discussion (based on quality of input)

a. Excellent (Student took a leadership position.) _____

b. Good (Student contributed and explained satisfactorily.) _____

c. Fair (Student contributed, but explanations were less than satisfactory.) _____

d. Poor (Student contributed little and offered no explanations.) _____

e. Student did not participate. _____

4. Typing

a. Accurately typed with neat corrections _____

b. Accurately typed with some poor corrections _____

c. Typed with uncorrected errors _____

d. Handwritten _____

KEY

Activity 1

Section I--Skills used to set up the workshop

1. Sources of Information: The secretary will have to know where and with whom to make the room reservation, and where to locate an overhead projector and a screen.

2. Ability to Work With People: The secretary will have to work with the supervisor in planning the workshop, with the person who handles the conference room reservations, with the person from Smith and Jones to get a list of participants, with a caterer or restaurant personnel to arrange the luncheon, with a bakery and soft-drink distributor to arrange for morning and afternoon refreshments, and with the two temporary clerks who are hired to help assemble workshop packets.

3. Organizational Ability: The secretary will have to be able to set priorities so that all of the pre-workshop planning is completed on time. The secretary will also have to be able to determine which items on the list will have to be done first, so that the planning stage of the workshop goes smoothly.

4. Taking Dictation: Ms. Lincoln's note on the preparations sheet indicates she will dictate the letter to the participants.

5. Transcribing: The secretary will have to be able to read and transcribe the dictation from Ms. Lincoln.

6. Grammar and Punctuation: While transcribing a dictated letter, it is the secretary's responsibility to check the grammar the dictator has used and to insert the correct punctuation.

7. Spelling: The spelling of all words in the letter and the names of the workshop participants must be accurate.

8. Typewriting: The letter to the participants, the list of participants, and the participants' name tags will all have to be typed.

9. Using the Telephone: The secretary will have to place a call to Smith and Jones Publishing Company and may also have to respond to telephone calls from Smith and Jones or from some of the workshop participants.

10. English: When speaking with Ms. Lincoln, with someone from Smith and Jones, with various workshop participants, with someone from the temporary agency, with the caterer, with the soft-drink distributor, and with the temporaries who are hired, the secretary will have to be able to explain precisely what is expected or needed. The secretary also must be able to communicate effectively with Ms. Lincoln.

11. Reliability: Ms. Lincoln must be able to rely on the secretary to complete and follow up on all of the necessary arrangements without having to constantly check that something has been done.

12. Arithmetic: The secretary will have to use basic arithmetic skills in estimating the costs of the luncheon and refreshments for the workshop participants and for rental of any equipment C.C.I. will need to have brought in to make the presentation.

13. Using Office Machines: Since Ms. Lincoln has indicated that the supply of some of the materials needed by workshop participants is low, the secretary will have to duplicate more and will have to know which process to use. The secretary will also have to use a calculator or adding machine to estimate the total cost of the luncheon and of the refreshments.

Section II--Skills used the day of the workshop

1. Organizational Ability: The secretary will have to know what materials are needed to run the workshop and will have to be able to determine the most functional room arrangement for the planned activities.

2. Enthusiasm: The secretary will have to be enthusiastic and friendly when greeting the conference participants.

3. Ability to Work With People: In greeting participants and in solving any problems that arise, the secretary will have to be able to work with other people.

4. English: The secretary must be able to communicate effectively with all of the workshop participants.

5. Taking Dictation: The secretary will have to use shorthand to take notes during the question-and-answer period.

6. Transcription: The notes taken at the workshop will have to be transcribed for distribution or for the file on this workshop.

7. Grammar and Punctuation: While transcribing the notes from the workshop, the secretary will have to apply rules for grammar, punctuation, capitalization, etc.

8. Typewriting: The notes from the workshop will have to be typewritten for ease in reading.

Section III--Skills used to wrap up the workshop

1. Initiative: Once a workshop is over, it is difficult to complete the follow-up steps that must be done. The secretary must display initiative in doing the follow-up tasks without being told.

2. Arithmetic: The secretary will have to use some basic arithmetic skills to compute the costs of the workshop.

3. Using Office Machines: The secretary will have to use a calculator or adding machine to compute the workshop costs in preparing the invoice and to check the figures on the bills for the refreshments and the luncheon.

4. Typewriting: The invoice and possibly the check will have to be typewritten. In addition, a file folder label will have to be prepared.

5. Sorting, Filing, and Retrieving Information: In order to set up the client file for Smith and Jones Publishing Company, the secretary will have to know which documents from the workshop to keep and which to destroy. Once the file is prepared, it will have to be stored in the correct position among other client files.

KEY

Activity 2

General, specific, and personal/professional skills used

1. Ability to Work With People: The general office clerk had to work directly with people in greeting patients.

2. Arithmetic: The office clerk must use basic arithmetic skills to add charges to a patient's account and to subtract payments from these accounts.

3. Legible Handwriting: The office clerk had to write legibly in recording charges and payments on patients' account cards, in writing patients' names in the appointment book, and in writing receipts for payments.

4. Bookkeeping: Bookkeeping skills were used to keep a record of charges and payments to patients' accounts.

5. Using the Telephone: The office clerk answered the telephone several times during the day.

6. Handling Mail: The office clerk had to be aware of what types of mail services to use to send out two packages.

7. Typewriting: The office clerk had to type monthly statements and a letter.

8. English: The office clerk wrote a letter to a credit/collection agency. In order to insure that the meaning of the letter was clear, the clerk had to have a good command of the English language.

9. Grammar and Punctuation: When composing the letter to the credit/collection agency, the office employee had to know and be able to apply the rules governing grammar and punctuation.

10. Spelling: Spelling words correctly is a skill the office clerk used in writing letters and in scheduling appointments (patients' names).

11. Sorting, Filing, and Retrieving: The general office clerk had to use these skills in finding patient files when a patient arrived and in returning them to the file cabinet when the patient's appointment was over. The office clerk also used these skills when preparing monthly statements.

KEY

Activity 3

General, specific, and personal/professional office skills needed:

1. Typewriting: The monthly reports and the memorandums must be typed before being distributed.

2. Using Office Machines: The secretary must be able to decide on an appropriate way to reproduce the reports and the memorandum and then must be able to perform the task.

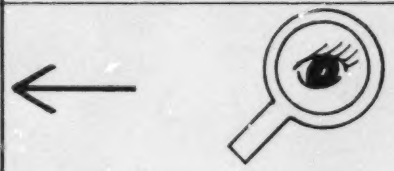
3. Emotional Stability: The secretary has to remain calm when placed in a stress situation like that which occurs when a "rush" job is needed while the office employee also is working to meet a deadline on another job.

4. Speed and Accuracy: When work such as the memorandum is needed by a certain time, the secretary must produce the work quickly and without error.

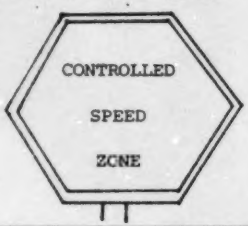
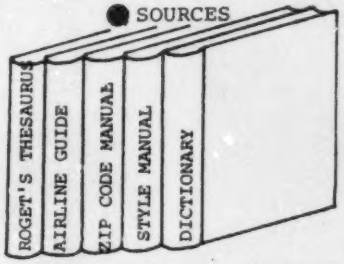
5. Confidentiality: The secretary must keep all conversations about office or personal business with a supervisor confidential. The secretary cannot reveal to the curious secretary confidential information that Tomi may have mentioned.

6. Loyalty: When the curious secretary questions Tomi's leadership abilities, Tomi's secretary must represent the best interests of the supervisor through remaining loyal to Tomi, both in words and in implication.

SLIDE NO.	SLIDE DESCRIPTION	NARRATIVE
1	Focus/Synchronize Slide	
2	Title Slide	
3	(Pictures of four business offices of various sizes) office with one secretary | office with six-ten secretaries office with two-five secretaries | office with 11+ secretaries	Business offices come in all sizes and types. Regardless of the size of the business office, or the type of company in which each is found, however, persons looking for office positions must have certain basic skills in order to get a clerical or secretarial job. These basic skills can be broken down into three categories.
4	GENERAL OFFICE SKILLS ● English ● Grammar and Punctuation ● Spelling ● Arithmetic ● Speed and Accuracy ● Bookkeeping ● Legible Handwriting ● Sources of Information	General office skills include the ability to use the English language well, the ability to use correct grammar and punctuation, the ability to spell words correctly, the ability to do basic arithmetic, the ability to complete assignments quickly and accurately, the ability to do basic bookkeeping tasks, the ability to write neatly, and the ability to find needed documents or information.
5	SPECIFIC OFFICE SKILLS ▶ Typewriting ▶ Taking Dictation ▶ Transcribing ▶ Sorting, Filing, and Retrieving Information ▶ Using Office Machines ▶ Using the Telephone ▶ Handling Mail	Specific office skills that an office employee needs include typing; taking dictation; transcribing; sorting, filing, and retrieving information; using various office machines; using the telephone in a businesslike manner; and handling incoming and outgoing mail.

SLIDE NO.	SLIDE DESCRIPTION	NARRATIVE
6	PERSONAL/PROFESSIONAL OFFICE SKILLS ■ Enthusiasm ■ Loyalty ■ Initiative ■ Reliability ■ Organizational Ability ■ Emotional Stability ■ Confidentiality ■ Ability to Work with People	In addition to these obvious skills, office employees also need to develop personal and professional office skills. Among these personal and professional skills are enthusiasm, loyalty, initiative, reliability, organizational ability, emotional stability, confidentiality, and the ability to work with people.
7		Now, let's go back and examine the skills necessary for employment in a business office, to find out exactly what each of them means.
8	GENERAL OFFICE SKILLS 	General office skills are those skills that all persons who work in business offices need in order to do the tasks they are assigned. These skills are not specific to any one task, but are used in many different jobs that an office worker does. Each time you see a red circle during this presentation, you will know that we are referring to a general skill.
9	● ENGLISH com·mu·ni·cate/ka-'myu-na-kāt to transmit information, thought, or feeling so that it is satisfactorily received or understood	A good command of the English language is one of the most important skills an office employee must have. You must be able to communicate with your superiors, with your subordinates, with your co-workers, and with office callers. It is important that you be able to use the words that say exactly what you want to say, so that you are not misunderstood. If you are a careful listener and a person who likes to read, your vocabulary will increase rapidly, and you will communicate more effectively.

SLIDE NO.	SLIDE DESCRIPTION	NARRATIVE
10	● GRAMMAR AND PUNCTUATION **No** / **Yes** We ain't gonna start the meeting until two o'clock. / We will not start the meeting until two o'clcck. The companies officers will meet in room 143 rather than in room 17 as originally announced. / The company's officers will meet in room 143, rather than in room 17 as originally announced.	The use of correct grammar and punctuation is another sign of a well-prepared office employee. Very often, the person dictating a letter or preparing a report is concerned only with the content of the material being sent. If this happens, the secretary or typist must be able to recognize and correct grammar and punctuation errors. An employee who has these skills will quickly become a valuable member of any office staff.
11	● SPELLING To send out a letter containing a spelling error would be an example of ~~carlesnes~~ ~~carelesnes~~ ~~carelessnes~~ carelessness.	Misspelled words take away from the effectiveness of business papers of all kinds. If you are not a good speller, be sure to keep a dictionary handy; one misspelled word can ruin the effectiveness of an otherwise perfect letter or report.
12	● ARITHMETIC 17 + 34 = 51 142 - 86 = 56 12 x 69 - 828 486 ÷ 9 = 54 $10,482@ 6.2% taxation = $649.88 worth of taxes 23	Incorrect figures can cause even greater problems than can misspelled words. Whenever a report, letter, or other business paper contains figures, these figures must be checked for accuracy. Even though the company for which you work may provide calculators for this purpose, if you do not understand the way the problems are done, you will not be able to put the figures into the machine correctly, nor will you be able to check to see if the answers are correct. 24

SLIDE NO.	SLIDE DESCRIPTION	NARRATIVE
13	● SPEED AND ACCURACY  	Producing neatly done, accurate work is important. However, speed and accuracy go hand-in-hand as skills of a good office employee. It is important to understand that you must not give up one for the other. If work is completed rapidly but is not correct, it will have to be redone. On the other hand, if you take a great amount of time to do something to insure that it is correct and complete, you may miss important deadlines.
14	● BOOKKEEPING (show general journal sheet--p. 19 of Accounting So. Western by Swanson et.al.)	Although not all office employees need an in-depth knowledge of accounting in order to do their jobs, the ability to perform such bookkeeping tasks as keeping payroll records is valuable. The more skills you have, the more opportunities you will find for moving up in the career ladder of the office worker.
15	● LEGIBLE HANDWRITING 7 = 7? 9?	One of those skills that is not often used, but is good to have, is the ability to write neatly. Most work that leaves an office is typewritten. However, there are times when using a typewriter is not practical; when this kind of situation occurs, you will be required to produce a handwritten document. If your handwriting is not clear and easily read, the person reading it may make errors that could otherwise have been avoided. And errors of any kind--but especially errors in numbers--can be very costly.
16	● SOURCES  	Errors of all kinds <u>can</u> be avoided by using reference books. Especially valuable to any office employee are reference books such as a Roget's Thesaurus, a dictionary, a ZIP-code manual, a secretarial/clerical style manual, an airline schedule guide, and others. You should become aware of the kinds of information the various reference books provide and, if possible, keep on hand up-to-date copies of the sources you most often use.
17	SPECIFIC OFFICE SKILLS 25	The second category of skills an office employee needs are specific office skills. <u>Specific office skills</u> are those skills that you will need to do the job for which you are hired. The better skills you have in these areas, the greater your chances will be to get and hold a good office job. Each time that you see a red triangle during this presentation, you will know we are talking about a <u>specific skill</u>.

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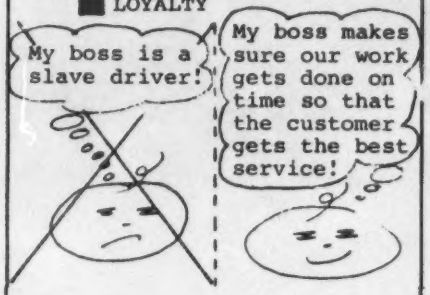
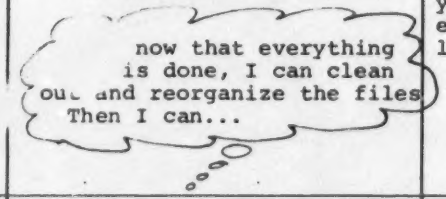
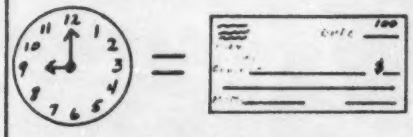
SLIDE NO.	SLIDE DESCRIPTION	NARRATIVE
18	▶ TYPEWRITING (photo of a secretary typing)	Typewriting is a skill that is required in most office positions. The rate at which you type, and the quality of the work you produce, will greatly affect the pay you receive, as well as the promotions for which you will be eligible. As an office employee, you should be prepared to type letters, reports, agendas, and various business forms. You might also be required to type from machine dictation or from dictation over the telephone. Electronic typewriters, and other types of word processing equipment, will enable you to increase both your speed and accuracy on typewriting production. Whatever tasks you are assigned, however, it is important that you be well organized and that you be able to type the work both quickly and accurately.
19	▶ TAKING DICTATION (photo of a secretary taking dictation from an employer)	Another skill that will help you get a good office job is the ability to take dictation. In many offices, shorthand is a required skill for a high-level secretarial position. Although some employers are turning to machines for recording dictation, many still expect top-level secretaries to be able to take shorthand. This skill will not only allow you to record correspondence, but it will also enable you to take notes, minutes of meetings, telephone messages, and rapidly record other activities that are common in a business office. In addition, the study of shorthand will help you improve your skills in grammar and punctuation.
20	▶ TRANSCRIBING (photo of secretary transcribing from shorthand notes) | (photo of secretary transcribing from machine dictation)	Your ability to take shorthand, however, is only as valuable as your transcription skills make it. Your ability to transcribe either from shorthand notes or from machine dictation will depend upon your typing speed, your ability to organize as you type, and your knowledge of grammar, punctuation, and capitalization rules. Regardless of what your typing speed is on straight-copy material, it will probably decrease by about 15 words per minute when you are transcribing from printed material, by about 20 words per minute when transcribing from shorthand notes, and by about 30 words per minute when transcribing from a machine. You can increase your transcription speed by increasing your typing speed and by knowing the rules for punctuating, capitalizing, and writing grammatically correct sentences.
21	▶ SORTING, FILING, AND RETRIEVING INFORMATION (photo of file clerk working at files)	Once outgoing correspondence is typed and signed, or incoming correspondence is answered, those pieces of correspondence must be filed. Sorting, filing, and retrieving information is one of the most common skills required of office employees. All of the correspondence that is received in an office must be stored in a manner and in a place where it can quickly and easily be found when it is needed. For this reason, the office employee must know and be able to use filing rules. In addition, the office worker must be able to transfer this knowledge of filing rules to the particular filing system used in any office.

SLIDE NO.	SLIDE DESCRIPTION	NARRATIVE
22	▶USING OFFICE MACHINES (photo of a secretary checking figures by using a calculator) ---------- (photo of a secretary using a copier (Xerox type))	Although some of the tasks, such as filing, that an office employee does are time-consuming and routine, modern technology is constantly working to make the office employee's job easier. In recent years, we have seen many improvements in office machines; for example, electronic calculators have replaced adding machines and comptometers for use in checking the accuracy of figures and totals on invoices and purchase orders. Electrostatic copiers have, in many offices, relieved the secretary of the necessity of typing carbon copies. Even if using these kinds of office machines is not a major, direct part of your job, it will undoubtedly fit in somewhere.
23	▶USING THE TELEPHONE (photo of a secretary taking a message over the phone)	Sometimes the first, and possibly the only, contact a client or customer will have with your firm will be through a telephone conversation. Because first impressions are often lasting impressions, you must convey a friendly, but professional, attitude. To do this, you should: (1) answer the phone promptly, within the first three rings if possible; (2) identify yourself and your firm; (3) be helpful and courteous without giving out information the caller does not need; (4) close the call by telling the caller what you will do as a result of your conversation. You must remember, though, that action does not always stop once the conversation is over. If you have told the caller that you will do something, do it right away, before you forget.
24	▶HANDLING MAIL (photo of secretary/clerk operating a postage machine)	Another common way that customers will contact your firm is through the mail. You may be responsible for sorting, distributing, and opening incoming mail; and you may also be responsible for processing outgoing mail. Many large business firms employ a mail clerk to take care of these duties; but if you are employed by a firm that does not have such a position, you will have to be familiar with postage rates, how to use a postage meter, the various types of mail services available, and how to decide which service to use in a particular situation.
25	PERSONAL/PROFESSIONAL SKILLS ■	The final types of skills that we will examine in this presentation are personal and professional skills. These are the skills that each employee, as a member of an office team, uses to relate to other people--both in and out of the work force. Whenever you see a red square during this presentation, you will know that we are discussing personal and professional skills.
26	■ ENTHUSIASM caricature of a cheerleader	If you want to be a success in business, you must be enthusiastic--about your job, about your employer, and about life in general. If you have a zest for life, you are probably enthusiastic about almost everything you do. Employers look for this attitude in potential employees by carefully listening to their answers during the interview.

SLIDE NO.	SLIDE DESCRIPTION	NARRATIVE
27	■ LOYALTY  	Let's assume that you were enthusiastic during the interview and you now have the job. What kinds of additional personal and professional skills do you need to be successful in this position? One of the most important qualities you must possess is loyalty. This means that you always represent your boss and your company in the best possible light; you do not discuss office business with other employees nor with friends and acquaintances outside the office; you provide a means of positive advertising for your company. If you find that you cannot demonstrate this kind of an attitude, you need to look elsewhere for a job.
28	■ INITIATIVE caricature of a secretary standing at the files thinking  	If you are enthusiatic about and loyal to the company you work for, you are well on the road to success. Other success-measuring skills should come easily. For example, initiative. Initiative is that quality which you show when you see things that need to be done, and do them--without being told. This does not mean that you take over your boss's duties, or the duties of fellow employees. It does mean that you exercise common sense, and perhaps do things ahead of schedule whenever your work load is light.
29	■ RELIABILITY (photo of secretary arriving at the office at 8:50--clock in background)	Are you the type of person who is usually on time for appointments? Can you be relied upon to get a job done on time without being asked or reminded? Do you have a good health record? Are you rarely absent from classes or work? If you can answer "yes" to these questions, you probably would be a reliable office worker. Employers value workers they can depend upon to do a job thoroughly and on time.
30	■ ORGANIZATIONAL ABILITY (photo of a stack of work that has been prioritized by using a numbering system)	Employers also value office workers who are organized and who have the ability to organize work for others. Very often, your boss will not have the time to plan what work must be completed first, and then to check to be sure that it has been done. The secretary with organizational abilities is able to set priorities in deciding the order in which tasks should be done, and then remembers to follow-up on assigned tasks to be sure they are completed on time.

SLIDE NO.	SLIDE DESCRIPTION	NARRATIVE
31	EMOTIONAL STABILITY (caricature of a secretary surrounded by stacks of work with the clock on the wall showing 3:45)	Regardless of how well organized you are, however, crises may still occur. Perhaps a deadline draws near and the necessary work has not been completed; or maybe work has piled up just when a "rush" job is demanded. In instances such as these, you must remain calm and keep the work moving. At the same time, you must be able to handle other employees' reactions to these kinds of stress situations.
32	CONFIDENTIALITY (photo of secretary greeting a visitor and covering up confidential work that is in the typewriter)	There are, in fact, many situations that may produce stress in the office; and many times in trying to find ways to change these situations, bosses will discuss them with their secretaries. A good secretary does not repeat any part of such a discussion, either within or outside of the office. Confidentiality means that you can be trusted not to repeat those things someone tells you in private; it means that you do not share company business with others; it means that if you are typing material that is confidential, you cover it up or roll it back in the typewriter when you have to leave your desk or turn your attention to someone who comes to your desk.
33	ABILITY TO WORK WITH PEOPLE photo of secretary greeting an office visitor | photo of small group of people around a wall chart depicting sales photo of office employees on a coffee break | photo of secretary talking on the telephone	Basically, all of the personal and professional skills involve working with people. However, because this is such an important factor in being a successful office employee, it must be stressed. Working in an office involves coming in contact with a wide variety of people each day. Employees who cannot get along well with others in the office often have difficulty getting along with people outside the office; and if this inability to get along with others extends to clients, it could mean a loss of business for the company.
34		In a business office, time is money. The office employee who does not have all of these general, specific, personal, and professional skills will be unable to complete work quickly and accurately and will, in effect, cost the company more money than one who has developed all of these skills to their highest levels.
35	caricature of a secretary sitting behind a desk. On the wall behind the desk is a plaque reading SECRETARY OF THE YEAR	Therefore, if you plan to become a valued office employee, develop your skills in all three areas: general office skills, specific office skills, and personal and professional office skills.
36	Credits Slide	

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STUDENT ACTIVITY PACKET

RECOGNIZING SKILLS NECESSARY FOR EMPLOYMENT IN A BUSINESS OFFICE

STUDENT ACTIVITY PACKET

Objective

To recognize skills necessary for employment in a business office.

Introduction

In order to prepare for employment in a business office, it is important to know exactly what skills are required. The potential office employee must have these skills or must be willing to develop them to their highest level; office employees who lack these skills will find themselves being kept in low-paying jobs, with little opportunity for advancement. Well-developed general office skills, specific office skills, and personal/professional office skills all work together in assuring the potential employee of a place in the business office.

Purpose

After completing the exercises in this packet, you should be able to recognize the office skills that are needed to handle various situations that might arise in a business office.

Materials

*Student checksheet for use with slide/tape presentation
*List of general office skills, specific office skills, and personal/professional office skills
*Resource sheets for activities 1, 2, and 3
Typewriter
Correction materials
Typing paper

Directions

This packet contains three activity sheets. Each of these activity sheets gives a description of a situation that could occur in the office in which you will be employed. To complete each of the activities, use the provided list of office skills and the Student Checksheet and follow these steps:

1. Read carefully the description of the situation

2. Using the list of basic office skills and the Student Checksheet, identify all of the skills you would need to complete the task described.

3. Type a list of those skills you have identified, and explain why you feel each of the identified skills is needed.

When you have completed your list for each activity, paper clip each list to the activity sheet with which it belongs, and submit your work to your instructor for evaluation. Be sure to indicate all of the skills necessary for handling each situation.

(NOTE: The activity sheet for activity 1 will show, by section, the number of skills needed to complete that section of the activity. In activities 2 and 3, you will have to name the skills without being told how many are needed.)

STUDENT CHECKSHEET

(To Be Used With Slide/Tape Presentation)

This sheet is provided as a convenient means of taking notes during the slide/tape presentation. The answers to the questions presented here will be useful when completing the activities that accompany this presentation.

1. There are eight general office skills you will need to get a secretarial or clerical office position. Name these skills and tell why each is necessary.

a. _____ _____

_____

b. _____ _____

_____

c. _____ _____

_____

d. _____ _____

_____

e. _____ _____

_____

f. _____ _____

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g. _____ _____

_____

h. _____ _____

_____

2. Successful office employees need seven basic specific skills. Name these skills and tell why each is necessary for success on the job.

a. _____ _____

_____

b. _____ _____

_____

c. _____ _____

_____

d. _____ _____

_____

e. _____ _____

_____

f. _____ _____

_____

g. _____ _____

_____

3. Personal/professional skills are those skills you use to relate to other people in a work setting. Name these eight skills and explain what each one means in terms of getting along with your employer and with other employees.

a. _____ _____

_____

b. _____ _____

_____

c. _____ _____

_____

d. _____ _____

_____

e. _____ _____

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f. _____ _____

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g. _____ _____

_____

h. _____ _____

_____

RESOURCE SHEET

Activities 1-3

BASIC OFFICE SKILLS

- General Office Skills
  - English
  - Grammar and Punctuation
  - Spelling
  - Arithmetic
  - Speed and Accuracy
  - Bookkeeping
  - Legible Handwriting
  - Sources of Information

- Specific Office Skills
  - Typewriting
  - Taking Dictation
  - Transcribing
  - Sorting, Filing, and Retrieving Information
  - Using Office Machines
  - Using the Telephone
  - Handling Mail

- Personal/Professional Office Skills
  - Enthusiasm
  - Loyalty
  - Initiative
  - Reliability
  - Organizational Ability
  - Emotional Stability
  - Confidentiality
  - Ability to Work With People

RESOURCE SHEET

Activity 1

You work as a secretary to Sara Lincoln, Director of Training for C.C.I., a firm that trains people to improve their reading, writing, and listening skills. If a company wants its executives to improve their communications skills, they contact Ms. Lincoln. Ms. Lincoln then plans the workshop. All of the training sessions take place in the conference room at C.C.I., with Ms. Lincoln serving as the trainer.

For the past week, Ms. Lincoln has been meeting with Pat Sands, the Personnel Director for Smith and Jones Publishing Company. They have been making plans for an eight-hour workshop for Smith and Jones' department managers. The workshop is to be held two weeks from this Friday, but all of the preparations must be completed two days before the workshop starts. The checklist that you will use to set up for this workshop is attached. (13 office skills)

* * * * *

On the day of the workshop, you must check to be sure that the room is in order and that everything needed to run the workshop is on hand. You help to greet the people who are participating in the workshop, take care of any problems that arise, and take notes during the question-and-answer period that will be held just before the workshop ends. (8 office skills)

* * * * *

When the workshop is over, you will have to make sure the conference room is put back in order. You will have to prepare the invoice to be sent to the company that asked to have the workshop put on (they will be charged $63.50 for each person who attended the workshop); pay the bills for the coffee, soft drinks, and doughnuts and the luncheon; and set up a file folder for Smith and Jones Publishing Company. (5 office skills)

* * * * *

What general, specific, and personal/professional office skills would you need to set up, help run, and then wrap up this workshop?

RESOURCE SHEET

Activity 1

WORKSHOP PREPARATIONS

Checklist

1. Reserve Conference Room
   8 a.m. - 5 p.m. two wks. from Fri.
2. Send letters and registration forms to participants
   call Smith + Jones for names

I'll dictate this tomorrow

3. Arrange for luncheon
   noon - 1 p.m. @ $5 or less per person (prefer buffet)
4. Order refreshments
   coffee + doughnuts - a.m.
   coffee + soft drinks - p.m.
   tea?
5. Gather materials for participants
   30 people
6. Assemble training packets
   call Temporary Agency for 2 clerks to help
7. Prepare list of participants and name tags
8. Special instructions

We're running short of some of the materials for participants - check which ones + duplicate

I'll also need an overhead projector + screen and a portable chalkboard - call United Rentals

RESOURCE SHEET

Activity 2

You are employed by Dr. Philip Jackson, D.D.S., as a general office clerk. In this position, you act as receptionist, typist, bookkeeper, and file clerk. Each day you greet patients; locate their files; record charges and payments; and replace each patient's folder in the files. In addition, since you are the only employee of Dr. Jackson, you also take care of scheduling appointments, placing and answering telephone calls, sending out monthly statements to patients, sending materials to dental laboratories, typing general correspondence, ordering office supplies, and paying bills.

* * * * *

This is a list of the things you did today:

1. Greeted 12 patients
2. Recorded payments and charges for each patient seen by Dr. Jackson
3. Wrote receipts to 7 patients for payments they made on their accounts
4. Scheduled appointments for 17 patients
5. Answered several telephone calls
6. Sent 2 packages to the dental lab
7. Typed and sent monthly statements to all patients whose last names begin with A through J
8. Wrote a letter to a credit/collection agency concerning a patient whose account is past due

* * * * *

What general, specific, and personal/professional office skills did you use today?

RESOURCE SHEET

Activity 3

You are employed as secretary to Tomi Peterson, sales manager of a small, independent insurance company. Today is the last day of the month, and you must get all of the monthly reports completed and sent to the members of the Board of Directors.

All day you have been working steadily to make sure the reports are finished on time. Right after lunch, however, Tomi hands you a long memorandum that has to go out, before 3 p.m., to all staff members. The memorandum is written to all of the salespersons about their low volume of sales during the past three months. Tomi has discussed the problem with you on several occasions and has told you that because sales have been so low, at least one salesperson may have to be released.

Shortly after the salespeople have received the memos, one of the other secretaries comes to you and begins talking about the meaning of the memo. The secretary wants to find out if you know what Tomi is going to do. The secretary goes on to tell you that the salespeople are angry because they feel much of the problem is in Tomi's lack of leadership.

* * * * *

Which skills must you have in order to turn this day into a successful, productive one?